



AF/ JFW

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

In re application of:

**Joseph P. Healy et al.**  
(formerly Suzanne S. Allison et al.)

Appl. No: **09/393,024**

Filing Date: September 9, 1999

For: SYSTEM FOR FINANCIAL  
PLANNING

Art Unit: 3624

Examiner: Daniel S. Felten

Atty. Docket No. 2543-128329

Customer No. 26694

**Applicant's Statement of the Substance of the Interview**

Commissioner for Patents  
P.O. Box 1450  
Alexandria, VA 22313-1450

Sir:

In response to the Interview Summary dated October 20, 2004 for the interview conducted October 1, 2004, Applicant submits the following Applicant's Statement of the Substance of the Interview.

**Participants:** Exr. Daniel S. Felten and Applicants' Representative Michael A. Sartori, Ph.D.

**Date of Interview:** October 1, 2004

**Type:** Telephonic

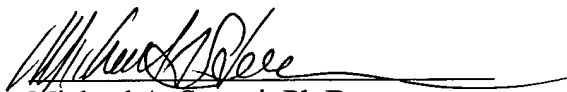
- 1) Brief Description of the Nature of any Exhibit Shown or any Demonstration Conducted: None
- 2) Claims Discussed: None
- 3) Specific Prior Art Discussed: None
- 4) Identification of Specific Proposed Amendments: None
- 5) Substance of Interview: Applicants' representative discussed the allowability of the after final amended claims.

6) Other Pertinent Matters: None

7) Results: Applicants' representative was told that the Examiner will consider the amendment after final and the Applicants' remarks. The Examiner also agreed to consult with a primary Examiner regarding the allowability of the amended claims.

Respectfully submitted,

Date: November 3, 2004



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